



# ECONOMIC GROWTH STRATEGY 2016-2021







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# 1. GREAT YARMOUTH IN PLACE AND TIME

## Location

Great Yarmouth is a predominantly urban borough within the rural county of Norfolk. It is located on the east coast of the East of England region of the UK some 120 miles from London and 100 miles from mainland Europe. The Borough of Great Yarmouth covers 174 km<sup>2</sup> (67.2 mi<sup>2</sup>/42,958 acres/17,385 hectares). Twenty miles east of the city of Norwich, the Great Yarmouth Borough Council area includes the major urban areas of Great Yarmouth and Gorleston and a surrounding of 21 rural parishes stretching from Winterton in the north to Hopton in the south. It is adjacent to the Norfolk Broads National Park.

## Transport

Great Yarmouth is accessible by road, rail, sea and air. The A47 goes straight into the heart of Great Yarmouth providing excellent access to the Midlands via the A47 and A14. Great Yarmouth is also served by the A12 to London. There are frequent trains to Norwich which connect to London and Cambridge as well as regular trains to Peterborough, serving the Midlands and Northern England.

Great Yarmouth is the closest port in the UK to Northern Europe with the Dutch port of IJmuiden less than 161km (103 nautical miles) away. Norwich International Airport is 37km (23 miles) from Great Yarmouth and provides direct scheduled flights to Schiphol Airport, Amsterdam with connections to many destinations world-wide. Whilst the North Denes Heliport no longer provides services to the offshore oil and gas industry, there are services from Norwich.

## History

The fortunes of Great Yarmouth have been bound up with the sea since it was first inhabited over 900 years ago. The town received its charter from King John in 1208 and in 1866, by Act of Parliament, Great Yarmouth became a fully-fledged trust port, run by haven commissioners.

Herring and holidays were the two industries that underpinned the town's prosperity in the 19th and early 20th centuries. The herring industry reached its peak at the start of the 20th century with fishing boats filling the river and then went into a long decline. In characteristic fashion, however, Great Yarmouth survived and flourished by adapting to new opportunities. The Second World War brought a new industry to Great Yarmouth in the form of electronics. A major factory relocated to Norfolk to escape the worst of the blitz and over time a cluster of electronics companies has sprung up. The 1960s brought further diversity when Great Yarmouth found a key role as a support centre for the burgeoning offshore oil and gas sector. In recent years, this expertise has been adapted to offshore wind energy.

Great Yarmouth has been a seaside resort since the late 18th century and a big step forward for tourism came in 1844 when Great Yarmouth got its first railway station. Visitors began to arrive in large numbers and the town has prospered over the decades. Today, Great Yarmouth remains a popular seaside resort in summer, while its many other attractions have made it a year-round holiday destination.

The Borough has a significant legacy of historic buildings linked to its maritime heritage including two Roman sites at Burgh Castle and Caister-on-Sea. Most of the rural villages in the Borough have medieval churches built of local materials such as flint, often surrounded by traditional thatched houses and with a village green.

## 2. THE STRATEGY

Great Yarmouth is a borough with many strengths: it is the main service base in England for the offshore energy industry and has a thriving tourism sector. There are also new opportunities for the borough in sectors such as offshore wind and culture-led urban regeneration. Nevertheless, there are relatively high levels of unemployment, especially during the winter, and the borough has a high concentration of deprivation. The strategy aims to address these challenges and meet new opportunities through further growth in the Borough's key sectors and by putting a new emphasis on Place.

Great Yarmouth is a borough with many assets but also some entrenched problems. As well as suffering from relatively high levels of unemployment and deprivation for the East of England, it is the main service base in England for the offshore energy industry and has a thriving tourism sector. The strategy aims to address these challenges and meet new opportunities through further growth in the Borough's key sectors and by putting a new emphasis on Place.

This Economic Strategy has been developed through a review of previous documents, policies and commissioned studies and consultations with local stakeholders. It sets out in detail the key sectors best-placed to deliver employment growth, prospects that are to be realised and the challenges in particular sectors that need addressing over the next five years.

This Strategy recognises the responsibility of local government to lead a place-shaping agenda. The role of place-shaping in local government reached prominence with the publishing of the Lyons Report into local government (2007), in which the idea of building and shaping local identity was put at the heart of local government's responsibilities. This need is also reflected in the Borough's Corporate Plan:

**"The Council as an enabler of economic growth will focus on strong place leadership, increasingly engaging with and helping to transform neighbourhoods and communities." – 'The Plan'**

Achieving this confirms the continued need for partnership working, which will continue in the form of the Economic Reference Group. The group brings together stakeholders from across industry, public and third sectors. The Borough has become well-known for its good partnership working and this approach offers the leverage needed for leading on place-making.

This strategy builds upon the preceding document, which covered the period from 2011 to 2016. That strategy was informed by an extensive employment study (see Appendix 1) that identified three sectors most likely to improve the employment prospects in the Borough (Energy & Engineering, Port & Logistics and Tourism). Since then, the New Anglia Local Enterprise Partnership's Strategic Economic Plan, which considers the sub region of Great Yarmouth and Lowestoft to represent a key growth location, has also reiterated that the energy, advanced manufacturing and engineering sectors are an important opportunity for the Borough. In addition, the Department for Culture, Media and Sport's White Paper on Culture (March 2016), highlighted the importance of culture and heritage in a local economy and this aspect is now included. Consequently, we are able to identify these three sectors to be central to the strategy's success:

- Energy & Engineering
- Port & Logistics
- Tourism, Culture & Heritage

These sectors are also the core of the New Anglia LEP's work, and "key to driving economic growth, improving productivity and stimulating innovation" in the region. Consequently, the sustainability and growth of these sectors, and access to these sectors, feature prominently in the Strategy's Action Plan.

Finally, to determine the needed renewal and improvement, a survey was sent to local businesses in autumn 2015 allowing recipients to reappraise the existing 'SWOT' (Strengths; Weaknesses; Opportunities; Threats) analysis. A further consultation letter was sent out in January 2016 to partners and stakeholders to re-evaluate the aims of the strategy. A teleconference



was held with Peel Ports in February 2016, with a letter of endorsement received. In April 2016, stakeholders from a wide range of sectors met for a consultation on the first draft of this strategy and their views have been influential in its development.

## Summary

The Strategy is to lead a place-making agenda that changes how Great Yarmouth is perceived and understood amongst residents, visitors, businesses, investors and potential workers. This will be underpinned by a continued emphasis on growing the key sectors, a joined-up approach to workforce development and due importance given to improved infrastructure. Achieving this strategy necessitates strong partnerships which can be achieved by joint actions, coordinated through the Economic Reference Group and using the Action Plan.

Leadership of this strategy resides with the Economic Development Committee. The strategy is realised through the implementation of the Action Plan. Its implementation in turn is reported to and monitored by the Economic Reference Group, whose membership consists of partners representing a wide-range of stakeholder groups, including further education, cultural and industry groups. An annual benchmarking report will summarise progress. Progress will be reported to the Economic Development Committee and further direction is taken from the Committee.

The Action Plan will deliver the needed improvement in each field. The individual actions are grouped under the four broad aims that encompass the strategy's aims on Place, Key Sectors, Workforce Development and Infrastructure:

- **A Destination In Which To Invest, Work, Visit and Live**
- **Key Sector Development and Sustainability**
- **Developing communities, entrepreneurship and the workforce**
- **A Prosperous Physical Environment and Improved Infrastructure**

The challenges and opportunities of each part of the local economy are described in this document. The actions shown at the end of the document will guide each area of the economy toward these common, overarching aims. Whilst these aims will guide the strategy's implementation over the next five years, the actions that sit underneath these aims can be revised as it progresses.



### 3. A DESTINATION IN WHICH TO INVEST, WORK, VISIT AND LIVE

#### What we are working towards:

On considering the investment of their life or capital into a town, the experience of Place is always an influential factor. So people will consider the lifestyle available in a town before deciding to move there, a decision which impacts on the existing business community and may prove pivotal for a potential investor. Equally, particular types of investment may encourage different socio-economic cohorts to the town, which may in turn encourage complementing businesses and new visitor markets. Recognising this shared challenge allows for leveraged gains from concerted efforts in related areas.

This connectedness lends itself to a joined-up approach to 'Place'. As such, the first aim of this Economic Strategy is to build on the sense of Place within Great Yarmouth, as aspired to in The Plan.

#### Envisioning Success:

The Aim has a broad remit, working toward success in four areas:

- Invest: Encouraging investors to 'buy into' the Borough's renewed sense of place resulting in higher business investment
- Work: Attracting and retaining & new cohorts of people and highly skilled workers
- Visit: Unlocking new visitor markets for the Borough
- Live: A cultural renaissance is central to the success of making the Borough an attractive place to live

#### Key Outcomes

As with all the four aims, the Strategy's Action Plan will propose a schedule of measures to advance the aim, which can be updated. A rolling completion of the actions will help towards achieving these key outcomes:

- Higher investment from the private sector

- Enhanced cultural place-making, improving graduate and skilled-worker retention, increased presence of cultural industries and attracting new visitor markets
- Revived evening economy
- Transform Great Yarmouth's arrival experience by creating a network of attractive, vibrant and well-connected neighbourhoods to create a new gateway to the town

#### Tourism

**Tourism is a designated key sector, but when considered alongside culture and heritage, it is also intrinsic to the destination element of this strategy.**

As a holiday destination for generations, Great Yarmouth is now the third largest seaside resort in the UK and the tourism industry contributes over £591m annually to the local economy through both overnight visitors and day visitors. Traditional tourism remains a bedrock of the economy, with up to 30% of total employment in the borough reliant on the industry.

This successful industry was bolstered in February 2015 with the creation of the Greater Yarmouth Tourism and Business Improvement Area Ltd, with these objectives:

- To increase the number of people visiting and staying in Greater Yarmouth
- To improve the visitor experience and increase repeat visits
- To encourage people to stay longer and visit more attractions
- To provide incentives and opportunities to spend more in local businesses

Since its inception, many projects and a large marketing campaign have been enabled by the many businesses working together through the Business Improvement Area. The inaugural Great Yarmouth Air Show in 2017 is its most prominent success to date.



Tourism has changed significantly in the last 20 years while the borough's offer of the traditional family holiday experience continues to be in demand, this strategy will work towards a long-term view of how the industry can invest for commercial success and evolve for the future. This will require gradual evolution of the visitor offer repositioning, challenging expectations to attract new visitors and stronger integration of arts, culture, recreation and leisure.

## Culture

**There is also ample opportunity for parts of the industry to move up the value chain to create a new market that may bring additional benefits to the town, such as less seasonal unemployment, a change in the perception of the borough and regeneration through a cultural offer.**

In March 2016, the Culture White Paper was presented to Parliament and outlined the advantages of a strong cultural sector:

Culture brings many benefits.

- the intrinsic value: the enriching value of culture in and of itself;
- the social value: improving educational attainment and helping people to be healthier; and
- the economic value: the contribution culture makes to economic growth and job-creation

In 2014, the economic contribution of museums, galleries, libraries and the arts was £5.4 billion, representing 0.3 per cent of the total UK economy. Heritage tourism accounts for 2% of GDP, contributing £26 billion per year.

Great Yarmouth has the attributes and assets to improve its cultural offer and receive the benefits of doing so. To this end, the Council is also working with the Arts Council England to develop an Arts Strategy for 2016 and beyond. It will seek to create a more coordinated approach to major events and attractions across business, museums, arts and performance venues and spaces. This should create a stronger sense of place and support targeted promotion.

The cultural sector has been identified by New Anglia Local Enterprise Partnership (LEP) as one of 10 priority sectors vital to the realisation of the region's ambitious economic growth targets. The cultural sector currently contributes £83.6million to the region's economy. The role of the cultural sector in driving economic growth for the region is recognised by the Culture Drives Growth strategy, launched in November 2016.

The ongoing development of the King Street Quarter will remain a priority, and the Borough Council will look to create the possibilities for more coherent physical hubs for community and creative use to engender a successful creative quarter.

Heritage is also an important component of a cultural offer and Great Yarmouth is committed to making the most of its assets. There is fascinating heritage to explore from almost every era and beautiful architecture to match. Roman ruins can be seen at Burgh Castle and Caister-on-Sea. Almost every village in the borough has a Medieval church and Great Yarmouth itself has the second most complete Medieval town wall in England with eleven out of the original 16 towers still standing.

## 4. KEY SECTOR DEVELOPMENT AND SUSTAINABILITY

### What we are working towards:

The Borough of Great Yarmouth hosts a varied and strong industrial base, including a wealth of experience in the energy, engineering, manufacturing and boatbuilding sectors, all of which continue to be important industries serving customers across the globe.

From engineering to electronics, from grain handling to geosciences, Great Yarmouth has an extremely varied industrial base and a strong network in which companies can turn to each other for the specialist support they need. The preceding Strategy was built around the concept of Key Sectors, identified to be the primary source of new employment and growth in the Borough. This focus retains its logic. As such, whilst a broader approach allows for the shaping of Place, the development of sustainable key sector industries is needed to underpin other measures.

The Key Sectors identified are: Tourism, Energy and Engineering and Port and Logistics. Tourism, whilst a key sector, is also intrinsically linked to the first aim, A Destination in which to Invest, Work, Visit and Live.

### Envisioning Success:

Facilitating further growth and sustainability in the three key sectors through evidenced actions, revised regularly.

### Key Outcomes

The outcomes assigned to this aim are:

- Diversified and resilient industry, able to exploit new markets
- Expanded year-round tourism offer
- Further development of the Port





## Energy and Engineering

**Since the discovery of gas in the Southern North Sea (SNS) in the 1960s, Great Yarmouth has grown to be one of the largest service bases in the country, rivalled only by Aberdeen. The Borough is home to both international companies and small independent firms all contributing to the industry.**

The downturn in commodity prices has hit the sector hard, necessitating additional fiscal concessions from central government and a support package from New Anglia LEP (2016). In recent years there has been an added focus on the renewable sector, initially with Scroby Sands, one of the first wind farms in the UK and lying close to the Great Yarmouth shore. With proven expertise and the right location, Great Yarmouth was chosen to host the operations and maintenance for Dudgeon Offshore Windfarm in 2014 and as the port for the construction of the 325-turbine East Anglia ONE in 2016, which is forecast to bring 3,000 jobs to the area. In early 2016, Great Yarmouth's deep water harbour was selected as Siemens' assembly location and installation base, as part of works on the 56 turbine offshore Galloper Wind Farm project.

Even though planned investment in oil and gas over the next year is being scaled back, two major new fields Cygnus (the sixth largest gas field in the SNS and the largest discovery for 25 years) and Platypus, another significant gas field in the SNS, are expected to be on stream by 2020. These 2 fields represent investment of £3billion plus.

Whilst some companies are trimming contract staff as well as permanent staff, seeking efficiencies and taking steps to cut costs, other businesses are thriving and in the inevitable turbulence, new investment is possible from businesses entering the market with alternative models and innovative processes. From a global perspective, UK Trade and Investment still considers Oil and Gas to offer investment opportunities.

The recent downturn and oil price fall is expected to accelerate decommissioning activity, whereby a large number of offshore assets need to be brought back to shore, dismantled, cut up and safely disposed of/recycled. This market is said to be worth nearly £17billion in the UK over the next 10 years and will include 4 platforms in the SNS with a project value of nearly £1billion each. Peterson, a Great Yarmouth based business, has already invested in a base in the Port in a joint venture with Veolia.

Great Yarmouth and Lowestoft are at the heart of the East of England's energy powerhouse. It is estimated that £50 billion will be invested in the region's energy sector over the next two decades, with £18.1 billion to be committed by 2020.

## Offshore Wind

There have been three development rounds for offshore windfarms, co-ordinated by the Crown Estate – the owner of the seabed. Round 1 was launched in 2001. 18 sites in England and Wales were consented but only 12 were built. Scroby Sands windfarm, off the Great Yarmouth coast at Caister, was one of the first wind farms authorised under Round 1 to be operational. The sites were small (typically 20 turbines), close to shore and used onshore technology adapted for a marine environment. In essence they were designed to provide experience for future rounds and in total, capacity of the whole of Round 1 is 1.2GW. Scroby Sands windfarm has 30 x2MW turbines.

The much larger Round 2 programme was launched in 2003, located further offshore and in deeper waters. The idea was to encourage the development of new, larger turbines that would be more efficient further offshore, and also to develop a range of new technologies that would lead to lower subsidies being required. 15 sites totalling 7.2GW were consented, most off the east coast. Only 7 have so far been delivered and 4 more are under construction. The remainder will most likely be built at the same time as the Round 3 schemes. Typically a Round 2 project consists of around 80 turbines each.

The primary phase of the offshore wind programme is Round 3, which was announced in 2010. The intention is that its delivery should contribute significantly towards the Government's carbon reduction commitments. The other key aim was for the market of 25GW across these Round 3 windfarms (the largest in the world) to stimulate major investment from several tier 1 and tier 2 manufacturers. Round 3 features nine zones across the UK, with the three largest zones being off the east coast. When combined with the remaining Round 2 projects and significant investments off the Dutch and Belgian coasts, it is clear that the main ports between the Humber and Kent are going to host most of the UK's assembly, marshalling and construction work, together with the long term operations and maintenance business. There is still a strong likelihood that new manufacturing capability will be developed as Government seeks to achieve local content, although so far only the Siemens blade plant at Hull is under construction.

## Port and logistics

Peel Ports took over the ownership of the Great Yarmouth Port Company Limited in December 2015. This has been viewed as a vote of confidence in Great Yarmouth by the UK's second largest port group, with an operating model, which could well lead to more direct and indirect investment within and outside the port area.

Early evidence for this has been forthcoming, with the announcement in 2016 of the joint funding with East Anglian Offshore Wind of facilities in Great Yarmouth's outer harbour for the construction of the East Anglia ONE windfarm. Soon thereafter Galloper also announced Peel Ports Great Yarmouth to be the chosen Siemens wind turbine and tower assembly location and installation base. This will bring forward port investment in infrastructure, generating jobs and attracting inward investment into the port area.



## Energy Park

**The Great Yarmouth Energy Park comprises a 50-acre area in South Denes, a prime site near to the river port and the deep water outer harbour. Included within the area of the Local Development Order, the planning permission process for energy industry-related use is very straightforward.**

The Great Yarmouth Energy Park addresses the need to physically regenerate the project area due to its outdated buildings and road layout and generally run down appearance. The opportunity presented by the anticipated scale of the new economic activity associated with the offshore energy sector and the proximity of the Round 3 windfarms are triggers for redevelopment.





## 5. DEVELOPING COMMUNITIES, ENTREPRENEURSHIP AND THE WORKFORCE

### What we are working towards:

This part of the Strategy is dedicated to ensuring that people in the Borough have the right opportunities to succeed. This need extends from the Key Sectors, where upskilling may be paramount, to the Borough's deprived neighbourhoods.

### Envisioning Success:

Only a small proportion (15.3% - ONS 2014) of Great Yarmouth's population have 'high-end' skills and are qualified to NVQ Level 4 (degree level or higher) compared to the national (21.5%) and regional (33.1%) average. At the other end of the scale, the share of the population with no qualifications is 11.5%, higher than the regional (8.1%) or national (9.0%) figures.

Working Futures 2014-2024, a report from the UK Commission for Employment and Skills, details sectors that can expect employment growth in the years ahead, and which may see a fall in labour demand, either due to efficiency gains (e.g. agriculture) or a declining national market share (e.g. manufacturing). The report details a need for more construction workers in the year ahead, with other sectors also anticipating growth:

- Professional services
- Information technology
- Accommodation and food
- Arts and entertainment

Local characteristics would suggest the inclusion of 'STEM' (science, technology, engineering and mathematics) -related occupations to this list. In achieving this aim, partnership working is important and there are a number of stakeholders to work with, in addition to the local further education colleges.

There are a number of programmes involved in this field. The Neighbourhoods that Work programme aims to support private, public and voluntary sector organisations to transform the way services are delivered by working more collaboratively, with each other and local communities in Great Yarmouth. enterpriseGY is primarily tasked with encouraging enterprise and helping

residents start or grow their business but also has a remit to support with the clustering of cultural enterprises around St Georges. Skills for Energy, one of the East of England Energy Group's core programmes, is led by industry and its primary aim is to ensure the ongoing diversity and volume of skilled individuals to move towards securing the wellbeing of the energy sector.

Whilst some actions will have tangible success, such as number of new businesses started, others – such as reducing seasonality in the job market – can be expected to follow directly measurable outputs. Achieving the outcomes would also lead to a more skilled workforce, improved access to higher value jobs and an improved educational attainment.

### Key Outcomes

By addressing weaknesses in these fields, the measures outlined in the Action Plan intend to create:

- Greater entrepreneurialism
- Improved business resilience
- More highly skilled workforce, reflective of local industry needs
- More economically active workforce
- Residents in deprived communities able to engage with the economy
- Major opportunities in the area to provide employment and training opportunities for residents and life chances for children
- A better match of skills and supply demand
- Business growth
- Less seasonality in employment

**enterpriseGY helps local people start and develop their own business, as well as organising the annual Spirit of Enterprise Awards and hosting a number of events for new and aspiring business people alike.**

**Whether starting a business, or looking for new business skills, workshops and practical confidential advice are available. Nearly a thousand people have been helped into business over the last decade.**



## 6. A PROSPEROUS PHYSICAL ENVIRONMENT AND IMPROVED INFRASTRUCTURE

What we are working towards:

Improved infrastructure is central to raising productivity, enabling urban regeneration and unlocking growth, whilst an improved physical environment is intrinsic to successfully creating a destination in which to Invest, Work, Visit and Live.

Great Yarmouth Borough Council has an Infrastructure Plan (2014) which sets out a rolling programme of the infrastructure that is required to support the new development in the Great Yarmouth Local Plan. Trunk road improvements to the A47 (notably the dualling of the Acle Straight), a new Great Yarmouth Third River Crossing and improved tidal defences along the River Yare are key components. Infrastructure is not just restricted to roads and pipes, but the physical, social and green infrastructure required to enable sustainable development. The Infrastructure Plan states:

*"Creating prosperous and sustainable communities can only be done if the necessary infrastructure is in place. Effective and co-ordinated investment in the right infrastructure, of the right quality and at the right time, is essential to achieve the objectives of the emerging Local Plan and to ensure the sustainable economic, social and environmental future of the borough"*

Envisioning Success:

This Strategy supports the Infrastructure Plan's vision, comprising efforts to improve areas such as the energy-focussed Enterprise Zone, transport links and giving weight to efforts to upgrade the Borough's physical environment, with particular emphasis on Great Yarmouth's town centre, where a clear Town Centre Initiative aims to improve its vitality and vibrancy.

An upgraded physical environment is often reliant on changes to infrastructure. Other factors enable a renewed physical environment to succeed, such as encouraging new demographics and skills to move to an area, or attracting new visitor markets. In this regard, this wider Strategy helps bring this full spectrum of change together.

Key Outcomes

The measures outlined in the Action Plan intend to create the conditions for following outcomes:

- An improved town centre
- Continued development of Beacon Park
- Improved public realm
- Inward investment and expansion of businesses requiring access or proximity to the port and riverside encouraged
- Increased presence of services sector to broaden the economic base
- Transport and infrastructure will be joined up and much improved
- Residents, businesses and visitors will access and travel throughout the borough with ease
- Great Yarmouth will become a smart borough utilising technology to enable all to live with ease and convenience

## Infrastructure

**Great Yarmouth benefits from some excellent transport links and with ongoing investment in major roads in the region, the town, its port and its industrial areas are to be made even more accessible.**

A multimillion pound project to dual the A11 and remove bottlenecks was completed in 2014; the A47 Alliance have campaigned successfully to secure funding in the Autumn Statement 2014 for the dualling of the Blofield to Burlingham section, Acle Straight safety measures, Vauxhall roundabout scheme and improvements to the junctions at Gapton and Harfreys roundabouts and the A12/A143 link road has been constructed, connecting the A12 trunk road through the successful offshore energy related Beacon Park Enterprise Zone and across an emerging area of growth in south Bradwell to the Beccles Road.

A £9M New Anglia Local Enterprise Partnership (NALEP) 'Local Growth Fund' has been secured for a package of transportation and highway improvements. Further funding has been earmarked to progress the Third River Crossing project which has an adopted route to ease congestion throughout the urban area. In 2016, a £1m bid to the Department of Transport to progress the business case for the Third River Crossing was successful.

Great Yarmouth railway station is served by Abellio Greater Anglia who operate an hourly service to Norwich each day of the week, with the service becoming half hourly during peak periods. There are two direct weekend Saturday services to/from London Liverpool Street to cater for tourists heading to the town during the summer holiday season. From Norwich, there are regular services to London and Cambridge, as well as to Peterborough.

Norwich International Airport is a busy hub for year round regular scheduled services as well as seasonal services to a wide range of UK and European destinations. Nearly 460,000 passengers used the airport in 2015. Throughout the year, there are regular direct flights to Schiphol Airport, Amsterdam, providing connections to 190 destinations worldwide, and to Aberdeen, Edinburgh and Manchester. Norwich Airport is also an important base for services to the North Sea oil and gas platforms. It is also well placed for cost-effective transfers of workers to the wind farms off the Norfolk and Suffolk coast.

Peel Ports Great Yarmouth accommodates vessels of up to a maximum 30,000 dwt (deadweight tons) and has a wide range of berths and quays in the deepwater Outer Harbour and in the river, with no locks or bridges. The Outer Harbour is dredged to 10 metres at chart datum, and has 1,000 metres of quay space; the River Port has 36 quays covering 3,000 metres, accommodating vessels up to 110 metres in length and with up to 5.7 metres draft.

The mobile phone signal is poor in some areas with the A143 corridor leading out of Great Yarmouth being identified as a particular black spot. Better Broadband for Norfolk Programme aims to connect a large proportion of the borough to fast fibre based broadband services.

Great Yarmouth has large areas at high risk of flooding from the sea as the town is low lying and situated on a sand spit between the sea and the River Yare. These areas support some 21,200 direct jobs and wealth generation in the region of £859m each year. The town is currently protected against flooding from the sea with flood defences along both sides of the River Yare.

A bid has been submitted to New Anglia LEP to improve flood defence infrastructure to give present and future businesses along the riverside the confidence to invest, release employment land from flood risk constraint and protect the wider flood zone from tidal flooding both now and in the future. This will ensure that a number of New Anglia Local Enterprise Partnership (NALEP) objectives are achieved and support the SEPs high impact sectors of 'energy' and the 'port and logistics sector' which are identified as key underpinning sectors. It will also support the green pathfinder initiative through improving resilience to climate change. Replacing the flood defences will improve resilience to flooding as the current defences are at higher risk of failing. The stakeholder engagement of the Great Yarmouth Tidal Defence Business Partnership forms a collective voice in strong support of this bid from a jobs growth and business opportunity perspective.

The regeneration and growth of Great Yarmouth is heavily impacted by the challenge of flood risk in some key strategic locations and investment in flood defences will be required to realise the towns' full economic potential.



## Town Centre

**In 2015, the Borough Council commissioned a Masterplan to create a vision for a successful and sustainable town centre for the future. It draws upon the key recommendations set out in the 2011 Retail Study, the overarching ambitions set out in the Local Plan Core Strategy. This forms part of a wider town centre initiative which aims to deliver more vitality and vibrancy and aims to:**

- Provide a 15 year vision for Great Yarmouth town centre
- Set out realistic and required developmental milestones over the short, medium and long term duration of the plan
- Provide a clear statement of strategy to help unlock private sector investment for specific sites/projects, and public sector investment generally
- Develop principles for the location, scale and type of retail, leisure, residential and other commercial activity, particularly developing the 'twilight' and evening economies
- Form part of the evidence base for the Great Yarmouth Local Plan and be a material consideration in determining planning applications
- Develop and test principles for regenerating Great Yarmouth town centre.
- Identify and develop principles for key development opportunity sites, spaces and streets.
- Guide developers seeking to develop sites within the study area with regard to the principles of location, type, form, access and design of development.
- Provide an evidence base for planning policy and guidance on the principles for future developments in the study area.
- Provide guidance to Great Yarmouth Borough Council on the delivery of the masterplan.

Following changes in retail market in the 1980s, including changes to planning and preferential business rates, a number of 'high street' retailers followed the new out-of-town model and moved to the Gapton Hall Retail Park in late 1980s. During the 1990s Great Yarmouth's 'out-of-town' offer had increased to include retail units along Thamesfield Way Retail Park and Pasteur Road.

In response, several regeneration initiatives have been directed towards Great Yarmouth's town centre, including:

- The £20m "InteGreat" project to renew the public realm on the seafront and link it to the town centre;
- The £18m "Secondary Holiday Area Regeneration Project (SHARP)" to bring empty properties back into use;
- Revitalisation of Market Row and Broad Row;
- Development of the "Tide and Time" museum (European Regional Development Fund);
- Renewal of St Georges Park to 'Green Flag Award' status;
- The £9m St George's Chapel King Street project sponsored by CABI's "SeaChange" programme;
- The major 6,000m<sup>2</sup> net extension to Market Gates Shopping Centre which has attracted new national retailers such as Debenhams and New Look to the town centre; and
- Environmental improvements to Regents Road
- Great Yarmouth Business Improvement District, managed by the Town Centre Partnership (now in its third 5-year term)
- Since 2011, Great Yarmouth's recognisable 'banking quarter' along Hall Quay has significantly altered its appearance, with all but one bank consolidating into a single branch on the Market Place. Nationally, average vacancy rates have been falling since 2012. Great Yarmouth's peaked in 2013 (at 17.2%) and now stands at 15.2% (March 2016).

## 7. ACTION PLAN

A Destination In Which To Invest, Work, Visit and Live

Aim 1	Actions	Lead Delivery Partner	Secondary Delivery Partner	Key Measurables	Timescale	Outcomes
	Communicate with Great Yarmouth businesses and potential investors	GYBC EDU		<ul style="list-style-type: none"> <li>Publish two 'Business' EDU Newsletters per annum;</li> <li>Publish the 2016/17 Business Directory;</li> <li>Publish Business Support Guide and Inward Investment Prospectus"</li> </ul>	<ul style="list-style-type: none"> <li>2x Newsletter per annum (autumn 2016; spring 2017)</li> <li>2016/17 Great Yarmouth Business Directory: Autumn 2017;</li> <li>Publish Business Support Guide and Inward Investment Prospectus: March 2017</li> </ul>	<ul style="list-style-type: none"> <li>Higher investment from the private sector</li> <li>Enhanced cultural place-making, improving graduate and skilled-worker retention, increased presence of cultural industries and attracting new visitor markets</li> </ul>
	Establish the Great Yarmouth Cultural Board	GYBC Neighbourhoods & Communities	St George's Theatre; Greater Yarmouth Tourism and Business Investment Area; Seachange; enterpriseGY	<ul style="list-style-type: none"> <li>Board established, meeting regularly with a broad membership</li> </ul>	<ul style="list-style-type: none"> <li>Winter 2016/7</li> </ul>	<ul style="list-style-type: none"> <li>Revived evening economy</li> </ul>
	Advance the Great Yarmouth Water-front redevelopment project	GYBC Strategic Planning		<ul style="list-style-type: none"> <li>Town Centre Masterplan</li> <li>Local Plan: Part 2</li> </ul>	<ul style="list-style-type: none"> <li>March 2017</li> <li>December 2018</li> </ul>	<ul style="list-style-type: none"> <li>Transform Great Yarmouth's arrival experience by creating a network of attractive, vibrant and well-connected neighbourhoods to create a new gateway to the town</li> </ul>
	Promote the Greater Yarmouth area to visitors and investors	GYBC Tourism; Greater Yarmouth Tourism and Business Investment Area		<ul style="list-style-type: none"> <li>Great Yarmouth Tourism Brochure</li> <li>Improved Great Yarmouth Tourism Website"</li> </ul>	<ul style="list-style-type: none"> <li>Spring 2017</li> </ul>	



## Key Sector Development and Sustainability

Aim 2	Actions	Lead Delivery Partner	Secondary Delivery Partner	Key Measurables	Timescale	Outcomes
	Prepare supply chain data for all key sectors	GYBC EDU	EEEGR	<ul style="list-style-type: none"> <li>Decommissioning Supply Chain Matrix</li> <li>Databases established</li> </ul>	<ul style="list-style-type: none"> <li>November 2017</li> </ul>	<ul style="list-style-type: none"> <li>Diversified and resilient industry, able to exploit new markets</li> <li>Expanded year-round tourism offer</li> <li>Further development of the Port</li> </ul>
	Promote key sector opportunities at international trade fairs and conferences	GYBC EDU	Enterprise Zone Working Group; EEEGR	<ul style="list-style-type: none"> <li>Attendance at Offshore Energy, Amsterdam</li> <li>Attendance at MIPIM 19-21 October 2016</li> </ul>	<ul style="list-style-type: none"> <li>Offshore Energy 25 and 26 October 2016</li> <li>MIPIM 19-21 October 2016</li> </ul>	
	Obtain private sector support for cultural place-making	Cultural Board	enterpriseGY	<ul style="list-style-type: none"> <li>Evidenced private sector support</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	
	Increase in the number of Great Yarmouth businesses accessing available grants	New Anglia Local Enterprise Partnership Growth Hub; GYBC EDU		<ul style="list-style-type: none"> <li>Increase in applications from Great Yarmouth businesses as reported by New Anglia Local Enterprise Partnership</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	
	Ensure the Enterprise Zone's Oil and Gas Taskforce funding is taken up by Great Yarmouth businesses	New Anglia Local Enterprise Partnership Growth Hub; GYBC EDU	Enterprise Zone Working Group	<ul style="list-style-type: none"> <li>Increase in applications from Great Yarmouth businesses as reported by New Anglia Local Enterprise Partnership</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	

Aim 3	Actions	Lead Delivery Partner	Secondary Delivery Partner	Key Measurables	Timescale	Outcomes
	Assist 100 residents a year to start up a business	enterpriseGY		<ul style="list-style-type: none"> <li>100 start-ups per annum</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	<ul style="list-style-type: none"> <li>Greater entrepreneurialism</li> <li>Improved business resilience</li> <li>Business growth</li> <li>Less seasonality in employment</li> <li>More highly skilled workforce, reflective of local industry needs</li> <li>More economically active workforce</li> <li>Residents in deprived communities able to engage with the economy</li> <li>Major opportunities in the area to provide employment and training opportunities for residents</li> <li>A better match of skills and supply demands</li> </ul>
	Advise and support small business to grow, diversify and be sustainable	enterpriseGY	New Anglia Local Enterprise Partnership Growth Hub	<ul style="list-style-type: none"> <li>60 per annum</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	
	Hold or support events to promote entrepreneurial skills	enterpriseGY		<ul style="list-style-type: none"> <li>18 per annum</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	
	"Provide support to local residents to access employment, address complex needs and drive community development to improve life chances for people living in more deprived areas of the borough"	Neighbourhoods that Work		<ul style="list-style-type: none"> <li>300 people seamlessly supported by Life Connectors to receive appropriate specialist support.</li> <li>150 long term unemployed people provided with up to 12 months transitional support by Life Connectors as part of welfare to work transition.</li> </ul>	<ul style="list-style-type: none"> <li>Progress Report by April 2017</li> </ul>	
	Develop a programme of training, customer focus and related quality assurance for all Great Yarmouth businesses associated with tourism	GYBC Tourism; Greater Yarmouth Tourism and Business Investment Area	enterpriseGY; FE Colleges;	<ul style="list-style-type: none"> <li>Evidence of a programme</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	
	Ensure the ongoing diversity and volume of skilled individuals to meet industry's needs, both now and in the future.	Skills for Energy		<ul style="list-style-type: none"> <li>To meet Skills for Energy's KPIs</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	



Aim 4	Actions	Lead Delivery Partner	Secondary Delivery Partner	Key Measurables	Timescale	Outcomes
	Reinvest Enterprise Zone retained Business Rates to promote the growth of the zone and the energy sector	Enterprise Zone Working Group; EDU		<ul style="list-style-type: none"> <li>Increase in floor space and jobs in the Enterprise Zone</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	<ul style="list-style-type: none"> <li>Improved town centre</li> </ul>
	Make ready the extensions to the South Denes and Beacon Park Enterprise Zone sites	New Anglia Local Enterprise Partnership; GYBC (Property; EDU)		<ul style="list-style-type: none"> <li>10Ha additional allocation at Beacon Park; addition of three individual sites on South Denes</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	<ul style="list-style-type: none"> <li>Continued development of Beacon Park</li> </ul>
	Underused Energy Park sites in the South Denes brought back to the market	GYBC; Great Yarmouth Development Company		<ul style="list-style-type: none"> <li>As described</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	<ul style="list-style-type: none"> <li>Improved public realm</li> </ul>
	Publication of the Town Centre Masterplan	GYBC		<ul style="list-style-type: none"> <li>March 2017</li> </ul>	<ul style="list-style-type: none"> <li>October 2016</li> </ul>	<ul style="list-style-type: none"> <li>Inward investment and expansion of businesses requiring access or proximity to the port and riverside encouraged</li> </ul>
	Create a coordinated a response to urban blight	GYBC		<ul style="list-style-type: none"> <li>Enforcement Programme established</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	<ul style="list-style-type: none"> <li>Increased presence of services sector to broaden the economic base</li> </ul>
	Advance the business case for the Third River Crossing	GYBC; NCC; New Anglia Local Enterprise Partnership	Norfolk Chambers of Commerce	<ul style="list-style-type: none"> <li>Business Case to be submitted to the Department for Transport To be evidenced (e.g. £ funding / Private sector support)"</li> </ul>	<ul style="list-style-type: none"> <li>August 2017</li> </ul>	<ul style="list-style-type: none"> <li>Transport and infrastructure will be joined up and much improved</li> </ul>
	Work with the A47 Alliance to seek the full dualling of the route through to Peterborough and promote dualling the Acle Straight	GYBC; NCC; New Anglia Local Enterprise Partnership; A47 Alliance	Norfolk Chambers of Commerce	<ul style="list-style-type: none"> <li>To be evidenced (e.g. miles dualled)</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	<ul style="list-style-type: none"> <li>Residents, businesses and visitors will access and travel throughout the borough with ease</li> </ul>
	Campaign for funding to improve the flood defences along the River Yare	Great Yarmouth's Tidal Defences Business Partnership;	New Anglia Local Enterprise Partnership; Environment Agency	<ul style="list-style-type: none"> <li>To be evidenced (e.g. £ private and £ public investment)</li> </ul>	<ul style="list-style-type: none"> <li>April 2017</li> </ul>	<ul style="list-style-type: none"> <li>Great Yarmouth will become a smart borough utilising technology to enable all to live with ease and convenience</li> </ul>

# APPENDICES

## Appendix 1: The Strategic Context

### Local

- Local Plan: Core Strategy 2013-2030 – Great Yarmouth Borough Council
- The Plan – Great Yarmouth Borough Council

Economic Growth is a stated priority in the Borough's Corporate Plan ('The Plan'), 2015-2020:

"Our Approach: The Borough of Great Yarmouth is well positioned to gain from the next generation of offshore energy developments and we need to continue to build on creating the conditions for private and public investment, capturing growth and the benefits to local communities"

### Regional

New Anglia Local Enterprise Partnership's Strategic Economic Plan –

- Energy and engineering; Ports and Logistics; Tourism and Culture are listed as sectors amongst those with the greatest potential for growth

Skills Manifesto – New Anglia Local Enterprise Partnership

Great Yarmouth and Lowestoft have CORE (Centres for Offshore Renewable Engineering) status, recognising the existing port infrastructure, skills, supply chain and local Government support to enable rapid growth within the offshore wind sector.

### Devolution

A devolution deal for East Anglia is being negotiated. It may mean an elected 'mayor' for East Anglia, with a leadership role on regional infrastructure and an ability to raise, as well as lower, business rates within a specified limit.

Independent of regional devolution, a form of local devolution has come into place since the last economic strategy, namely business rate retention. Moderated by a system of top ups and tariffs, local authorities retain their 'local share' (50% of Estimated Business Rates Aggregate). There are also new discretionary relief powers by way of the Localism Act 2011. These changes give financial incentives to councils to grow their local economies and tax base. At the same time, it has resulted in more risk and uncertainty.

New reforms look set to go further, allowing for 100% retention of the full stock of business rates by 2020. Local authorities without an elected mayor would be able to reduce their rates, but not raise them.

Great Yarmouth Borough Council voted to reject the proposed devolution terms, as they stood, on June 30th 2016.



## National

The Coalition government produced a Plan for Growth in March 2011 which looked at how the government could address the barriers faced by industry. Later that year Enterprise Zones were announced across the country and six sites in Great Yarmouth and Lowestoft were designated. An Industrial Strategy followed this complementing the Plan for Growth by improving access to finance for businesses and supporting emerging technologies. Sector strategies for the offshore wind industry and oil and gas followed in 2013.

Michael Heseltine's review of local economic activity, 'No stone unturned', published in October 2012, led to devolution of powers and financial resources and to the development of City Deals which in turn lead to the Growth Deals offered to the newly formed Local Enterprise Partnerships (LEPs).

Having had two rounds of Growth Deals the government is now engaging with local authorities and LEPs to encourage Devolution agreements – often covering wider areas than LEP boundaries.

In 2014 the government conducted a review of Assisted Areas and 11 wards in Great Yarmouth were subsequently designated for assistance, allowing for a higher intervention rate in terms of business support and enhanced capital allowances.



## Appendix 2: Employment Growth Study

Bone Wells Urbecon (BWU) was commissioned by Great Yarmouth Borough Council to carry out an Employment Growth study in 2009. The brief was:

To explore which sectors were most likely to generate good quality jobs  
What needs to be done to assist and enhance the process of job creation?  
How to ensure jobs are available for local residents

BWU carried out a statistical analysis and local interviews to produce an evidence base to establish which sectors in the economy had the potential to increase employment within the Borough.

Based on the analysis, the three sectors that would most likely improve the employment prospects in the Borough were:

- Energy & Engineering
- Port & Logistics
- Tourism

To establish how these sectors could maximise growth, BWU devised a list of scenarios which were then tested in workshops comprising of industry representatives. The outcome of the workshop produced the following scenarios.

Energy & Engineering	Port & Logistics	Tourism
Offshore gas	Cargoes	Heritage & Culture
Offshore wind power	Logistics and wholesale	Evening visitor economy (Town Centre)
Specialist engineering	Support for offshore energy	Self-catering caravans and chalets
	Ship repair/marine engineering	

Following on from the workshops, BWU created a series of proposed actions to be undertaken by a number of organisations with a view to promoting industry sectors in Great Yarmouth.

Overall, the conclusion of the study stated that in assisting the sectors to prosper, new jobs will be created that will be accessible to local residents. The focus is on actions that will lead to increased demand for the services of businesses, which over the long term will deliver the higher paid, skilled jobs that Great Yarmouth needs.



## Appendix 3: Strengths, Weaknesses, Opportunities and Threats

### STRENGTHS

- Quality of life and environment as an asset
- Attractive biodiversity, landscape and coastline
- Unique built heritage and history
- High level of specialist skills in offshore engineering (oil, gas and renewables) and marine sciences
- North Sea gas resource
- Strong delivery mechanisms and partnerships to deliver regeneration
- Major economic development investment at the Outer Harbour
- Legacy of successful regeneration initiatives – particularly the InteGREAT scheme
- Tourism
- Proximity to continental Europe
- Loyalty of staff and low staff turnover

### WEAKNESSES

- Ageing population and outward migration of working age population
- Difficult to attract people with key skills – poor graduate retention
- Weak skills base
- Low aspirations
- Education levels and performance lagging UK average
- Pockets of high level and persistent deprivation.
- Relatively high unemployment rate/economic inactivity
- Decline in traditional employment sectors
- Seasonal employment
- High percentage of low skilled jobs in key sectors.
- Low resident earnings
- Poor perception from outside borough
- Poor strategic transport infrastructure
- Poor land availability, condition and value
- Contamination of brownfield land in key development areas
- Physical constraint of location

### THREATS

- To become leaders in renewable energy and environmental services, particularly by developing offshore renewable energy sector.
- More visitors coming into the wider area/opportunity for increased employment in tourism/diversifying tourism offer
- Grow new sectors such as creative industries
- Availability of derelict/underused brownfield land in or adjacent to the centre of towns
- Flood defences opening up land/sites for development.
- Opportunity to develop green infrastructure Increase freight by rail
- Potential to boost cycling initiatives
- Proximity to mainland Europe and Scandinavia
- The development of the Outer Harbour and its related economic opportunities
- Expansion of higher and further education offer through upgrades of Great Yarmouth College.
- Proximity of proposed offshore wind farm developments

### OPPORTUNITIES

- Rising traffic volumes, heavy reliance on the car and limited public transport
- Internal transport issues; new river crossing to resolve congestion and the requirement for new access to a number of development sites
- Poor transport links to/from the borough, e.g. single carriageway trunk road
- Significant flood risk issues, as large parts of the regeneration area are within flood risk/flood plain areas
- Over dependent on single economies, i.e. offshore energy
- Brownfield land contamination adds to construction costs
- Declining levels of public intervention funding
- Required update of utility infrastructure, including ICT
- Limited opportunity for developer contributions toward infrastructure investments, due to limited housing growth (employment, not housing led regeneration)
- Impact of a falling oil price on industry across the borough

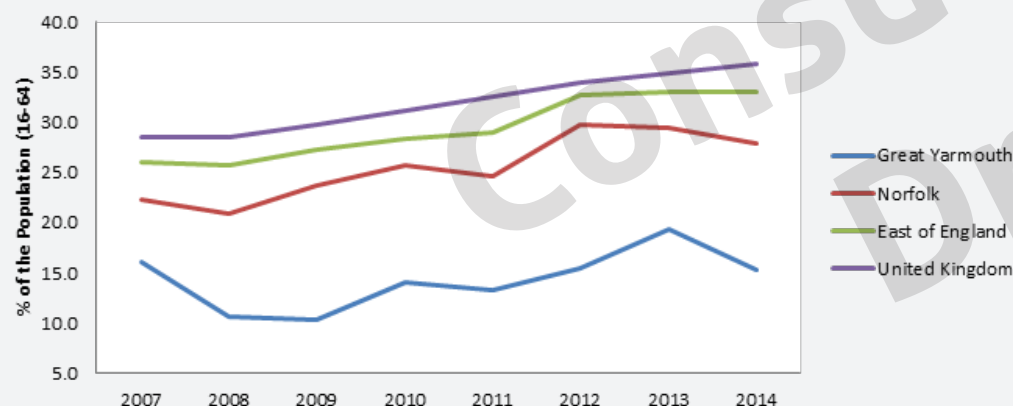
## Appendix 4: Comparative Measures:

### Skills & Education

Only a small proportion (15.3% - ONS 2014) of Great Yarmouth's population have 'high-end' skills and are qualified to NVQ Level 4 (degree level or higher) compared to the national (21.5%) and regional (33.1%) average. At the other end of the scale, the share of the population with no qualifications is 11.5%, higher than the regional (8.1%) or national (9.0%) figures.

Great Yarmouth GCSE achievement is below the national and county averages with 47.3% of its school children achieving 5 GCSEs graded A\*-C in 2013 compared to 62.2% in England and 53.9% in Norfolk.

#### % of the Population (aged 16-64) with NVQ Level 4 or Higher



Great Yarmouth has two colleges: East Norfolk Sixth Form is consistently rated amongst the top 20 in the country and offers a wide range of academic courses. Great Yarmouth College is a further education establishment which offers both academic and vocational courses. Both Great Yarmouth College of FE and East Norfolk Sixth Form are graded 'good' by Ofsted. The college offers a range of Apprenticeships from Intermediate to Higher Apprenticeships and Degree Apprenticeships. It is linked with University Campus Suffolk (UCS) to offer a range of degrees to local residents.

Working Futures 2014-2024, a report from the UK Commission for Employment and Skills, details sectors that can expect employment growth in the years ahead, and which may see a fall in labour demand, either due to efficiency gains (e.g. agriculture) or a declining national market share (e.g. manufacturing). The report details a need for more construction workers in the year ahead, with other sectors also anticipating growth:

- Professional services
- Information technology
- Accommodation and food
- Support services
- Arts and entertainment

**Population** – Great Yarmouth has a population of 98,200 (ONS Mid-Year Population Estimate 2014). More than a fifth of the population is aged over 65, a greater proportion than in the East of England and the UK. Great Yarmouth predominately has a white British population and 3.6% of the population are classified as 'white other'.

**Labour Market** – Great Yarmouth has a working age population of 59,200 of which 43,700 are economically active. The majority of residents are employees and work full time but a small proportion of the population are self-employed.

By some estimates (Destination Research Ltd 2013) tourism may supply over 15% of the total numbers of FTE jobs within the Borough.

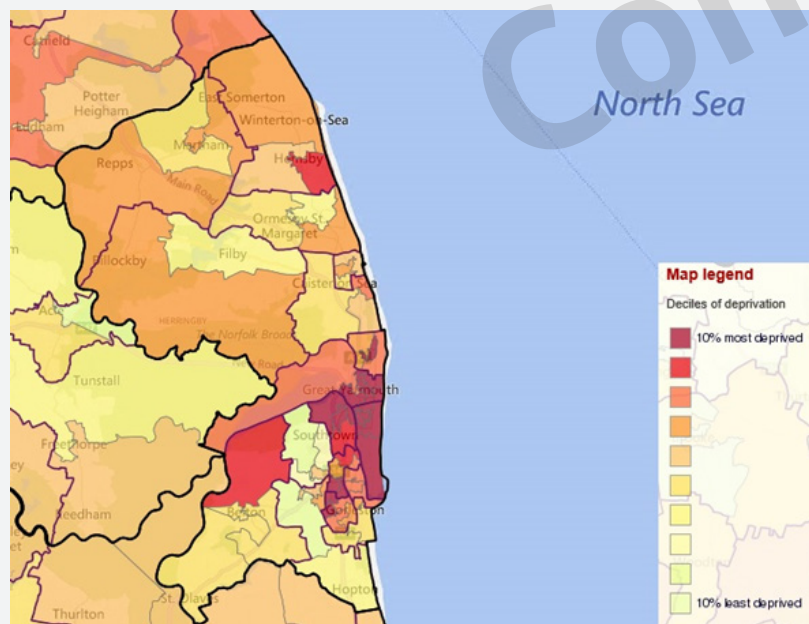
Great Yarmouth suffers from seasonal unemployment experiencing high levels during the winter months. The impact of the recession has seen a significant rise in unemployment levels similar to those experienced across the country.



**Deprivation** – Great Yarmouth suffers from high levels of deprivation and was ranked 20th in the 2015 English Index of Multiple Deprivation (local authority districts with the highest proportion of their neighbourhoods in the most deprived 10 per cent of neighbourhoods nationally). Deprivation is particularly pronounced in the central, urban wards and this is reflected in the Borough's 'rank of local concentration' (4th). The Borough also ranks highly for both employment and income (both 29th by the same measure).

The South Denes is an extremely deprived area, with neighbourhoods that are amongst the 1% most deprived in the country (2015 English Indices of Multiple Deprivation). The extreme relative deprivation extends to income, including the 'Income Deprivation Affecting Children Index' (IDACI), and education, amongst other measures. Unemployment levels are the highest in the Borough, with over 1 in 5 of all the Borough's JSA claimants residing in South Denes. Indeed, nearly 7% of JSA claimants in Norfolk reside in South Denes (NOMIS, March 2016).

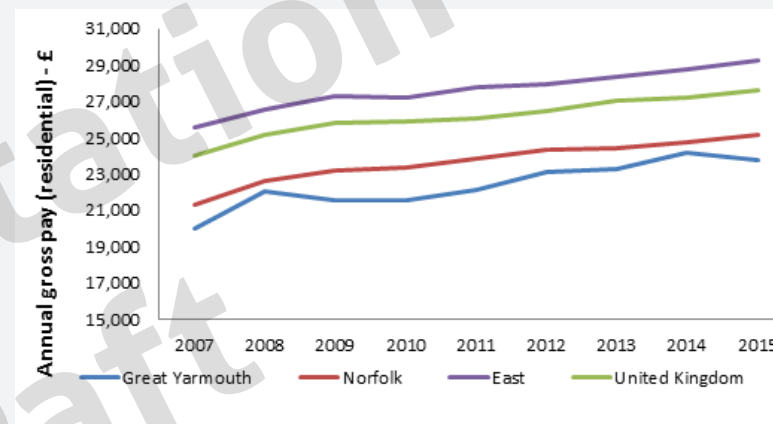
**Map 1: Index of Multiple Deprivation in Great Yarmouth by Decile**



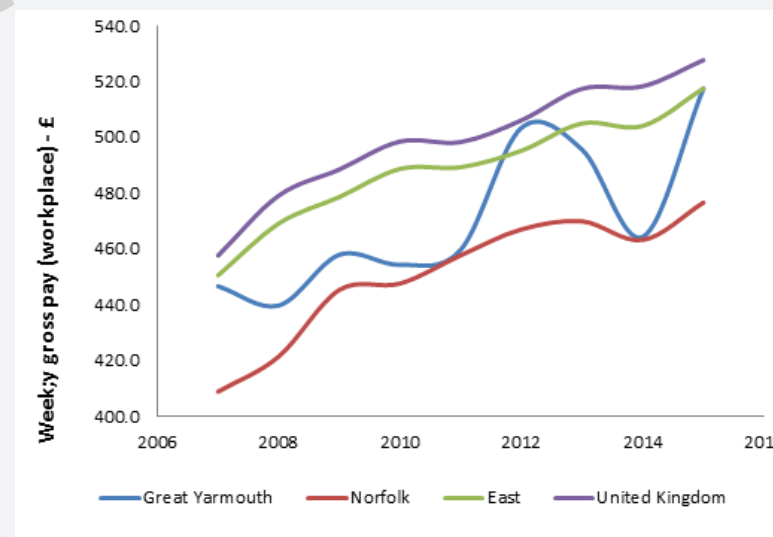
Source: Department for Communities and Local Government

**Earnings** – Residents in Great Yarmouth earn significantly below the regional and national average but employees in Great Yarmouth are amongst the highest paid in Norfolk. This suggests that the higher paid jobs are taken by those who live outside of the Borough but the statistics can also be skewed due to the high number of offshore workers whose companies are based within Great Yarmouth.

**Annual Survey Of Hours And Earnings - Resident Analysis (ONS)**



**Annual Survey Of Hours And Earnings - Workplace Analysis (ONS)**



## Businesses in Great Yarmouth

In 2015 Great Yarmouth had 2,940 businesses, with the vast majority (2,530) being micro businesses with fewer than 10 employees. 360 businesses were created in 2014. Great Yarmouth has more small and medium enterprises per (working age) capita than the national average, but fewer micro and large enterprises.

### Number of Businesses

Number of Enterprises by Area			
Employment Sizeband	Great Yarmouth	East	Great Britain
Total	2,940	242,975	2,382,370
Micro (0 to 9)	2,530	216,700	2,113,755
Small (10 to 49)	340	21,690	221,575
Medium (50 to 249)	65	3,680	37,895
Large (250+)	10	905	9,145
Number of Working Age Resident per Enterprise			
Employment Sizeband	Great Yarmouth	East	Great Britain
Total	20	15	17
Micro (0 to 9)	23	17	19
Small (10 to 49)	172	172	180
Medium (50 to 249)	898	1,015	1,052
Large (250+)	5,840	4,126	4,359

Source: UK Business Counts – Enterprises (ONS). In 2015, ONS extended the coverage of businesses to include a population of solely PAYE based businesses that were previously excluded because of the risk of duplication. In total, in 2015, 105,000 businesses have been added.

## Business Births

Count of births of new enterprises for 2009 to 2014						
	2009	2010	2011	2012	2013	2014
Great Yarmouth	350	250	275	320	400	360

## Appendix 5: The Great Yarmouth-Lowestoft Sub Region

Great Yarmouth and Lowestoft share a number of economic characteristics, both in terms of key sectors and economic challenges. The sub region is effectively a travel to work area with commuting flows between towns, with Great Yarmouth receiving a net inflow. Job losses in manufacturing over the last 35 years have weakened the two economies significantly.

One of the key sectoral links between the two towns continues to be the offshore energy industry. The two ports and their companies have been servicing the offshore oil and gas sector in the Southern North Sea (SNS) since the late 1960s. The nascent offshore wind power industry and opportunities in decommissioning hold great promise for both areas and have begun to be realised.

Other sectors such as boat building, food processing and electronics have all seen the two towns joined. Both towns were Regeneration Priority areas and had a shared urban regeneration company, 1st East, which wound up on 31st March 2011. The towns worked closely to achieve Assisted Area status for 20 wards across the sub region in 2014 and share an energy-focussed Enterprise Zone across six sites.

For a full analysis of Great Yarmouth and the wider regional economy, please read Norfolk's Story (Norfolk County Council) and the evidence base from the Employment Growth Study.



Consultation  
Draft



GREAT YARMOUTH  
BOROUGH COUNCIL